

Annual Performance Review Process Google Docs Tips - For Supervisors and One-Up Reviewers

General Tips and Facts About Google Docs

1. **Saving your text**
 - a. No need to look for a save option; Google Docs saves automatically every time you make changes.
2. **Sharing the document**
 - a. The document will be shared with the one-up reviewer automatically by the Division Process Owner (if this option was selected by your division).

If you are a supervisor, see tips below in following section.

If you are one-up reviewer, scroll down to the section entitled, “For One-Up Reviewers: Tips for Commenting on Employee’s Annual Performance Review.”

For Supervisors: Tips for Drafting Employee’s Annual Performance Review

1. **Accessing employee’s review form**
 - a. Search your email for the FY15 PMP Form with the employee’s name and click on link on word “here” in your email
 - b. Or, check 2015 Division Performance Review Website and click the link provided on website.
2. **Entering feedback in employee performance review**
 - a. Review the employee’s text on his/her accomplishments in each section.
 - b. Under each “supervisor” (blue) instruction section, in the white text box, type in your assessment of employee’s performance as appropriate to that particular section.
 - i. You can refer to statements made by the employee in the above section. Both sets of statements will remain in the same sequence in the form.
 - c. Use of bullets is highly recommended.
 - d. Use copy and paste from word documents or other Google Docs.
 - e. When you leave Google Docs, it will save your text.
3. **Coming back to complete employee’s review**
 - a. To continue working on your text
 - i. Click the link from your email.
 - ii. Check your 2015 Division Performance Review Website.
4. **After completing draft of review, release for one-up review**
 - a. Go to the Division Performance Review Website.
 - b. Find the row for the employee in the “Supervisor Table.”
 - c. Check the box “Share with reviewer(s).”
 - d. Select the proposed rating from the drop-down list.
 - e. Click the “Submit changes” button in the upper-right corner of the web page.
 - f. Your Division will decide whether to have automatic notifications sent by email when drafts of reviews are ready for one-up review.
5. **Responding and resolving one-up reviewer comments**
 - a. Look for suggested changes or comment boxes throughout the review. These are notes from the reviewer. Suggested changes are similar to track changes

made in Microsoft Word. Comments and suggestions may be in two places.

- i. One place is at top of review. Access by clicking the Comment button in the top right-hand corner of your browser window.



- ii. Other place is comment boxes throughout the review. Comments may be close to actual text that comment refers to.

- b. You can reply to a comment with a new post, edit or delete a previous comment, and resolve the discussion when you're ready to remove it.
- c. You can also accept changes by clicking on the check in the comment box or reject changes by clicking on the "x."
- d. Resolving a discussion removes the discussion from the review document, but resolved threads will always be available under Comments in the right-hand corner of your document.
 - i. These comments will not be seen when you print a paper copy for the employee discussion and signatures.
- e. *If you'd like to address your comment to a specific person (i.e. one-up reviewer), type a plus sign followed by their email address (e.g.: +johndoe@lbl.gov). That person will receive an email with your comment.

6. Completing your review

- a. Once you have resolved all reviewer comments, accepted or rejected suggested changes and **received clearance from your division management to finalize the review**, go to the Performance Website and check the "Finalize" box for that employee in the "Supervisor Table."
- b. Click the "Submit changes" button.

7. Printing the "finalized" review

- a. You will receive an email with the link to the final doc.
- b. Click on the link to view the final doc.
- c. Click on the printer icon to print the review. This is the paper copy that you will use for conversation with employee and to secure employee and your signatures.

FAQs for Supervisors

1. Can I access last year's review for this employee?

- a. If your division used Google Docs last year and your employee's review was finalized, last year's review will be on the Division Performance Review website. Click on the "prior year review" link in the supervisor table.

2. Can I access it after it's been submitted as complete?

- a. Once you have checked "Finalize" and clicked "Submit changes" button, the document can no longer be edited.
- b. If you need to make changes after submitting the document, please contact your Division Process Owner.
- c. You can view the final document by clicking the "final" link in the Supervisor Table.

3. How do I know if the one-up reviewer has reviewed it?

- a. If your division chose to use automatic notifications, you will receive an email to let you know who has reviewed the document.

- b. If your division has not chosen this option, you can go to the Division Performance Website, which will show who has completed their One-up reviews.
- 4. How can I see changes from one version of the review to the next after the one-up reviewer has commented (version control/history)?**
- a. Select “File,” then see revision history.
 - b. Click a timestamp in the right pane to see a previous version of the document, edited by the collaborators listed below the time stamp.
 - c. Any changes made by a particular collaborator will be shown in the body of the document in the color assigned to that individual in the revision history pane.

For One-Up Reviewers: Tips for reviewing the employee annual performance review

- 1. Accessing employee's review form**
 - a. Go to the Division Performance Review Website to access the form.
 - b. If your division chose to have automatic email notifications, you will receive an email with a link to the document.
- 2. Entering review comments**
 - a. Highlight or select the text you'd like to comment on.
 - b. From the Insert menu, select Comment.
 - c. You can also use keyboard shortcut Ctrl + Alt + M (Cmd + Option + M on a Mac) to insert a comment.
 - d. Type your comment in the box that appears to right of document.
 - e. After inserting a comment, there are two main places you can work with it —
 - i. Comment box
 - ii. Discussions thread
 - f. Access the comments by clicking the Comments button in the top right-hand corner of your browser window



- g. You can reply to a comment with a new post, edit or delete a previous comment you've inserted, and resolve the discussion when you're ready to remove it.
- h. Resolving a discussion removes the discussion from the review document, but resolved threads will always be available under Comments in the right-hand corner of document.
 - i. *If you'd like to address your comment to a specific person (i.e. to the supervisor to indicate document has been reviewed), type a plus sign followed by their email address (e.g.: +johndoe@lbl.gov). That person will receive an email with your comment.
- 3. Suggesting changes in the document (similar to track changes mode in Microsoft Word)**
 - a. The default for each document is “Suggesting.”
 - b. Type suggested changes in document. Document will track changes and highlight them in a different color.
 - c. The Supervisor can choose to accept these changes by clicking on the check box in the comment box to accept. They can also click “x” to reject in a

comment box.

4. Indicating you have completed your review of document

- a. Go to the Division Performance Review Website.
- b. Check the box in the One-up Review Table marked “I’m done.”
- c. Click the “Submit changes” button.
- d. If your Division has chosen to use automatic notifications, the Supervisor will receive an email informing him/her you have completed your review.

One-up Review Table						
Employee	Supervisor	Self Assessment	Performance Review	Finished Reviewing?	HR Review Status	
Stone,Mstone2 (mstone2@lbl.gov)	Stone,Mstone4	final	one-up review	<input type="checkbox"/> I'm done		
Stone,Mstone3 (mstone3@lbl.gov)	Ponte, Alan	final	one-up review	<input type="checkbox"/> I'm done		

Showing 1 to 2 of 2 entries

FAQs for One-Up Reviewers

1. What if I want feedback from the supervisor or I want the supervisor to make edits?

- a. Add a comment in the Google Docs form indicating what you'd like changed and type a plus sign followed by the supervisor's email address to notify them of your comments (e.g.: +johndoe@lbl.gov). The supervisor will receive an email with your comment.
- b. You can also suggest changes using suggesting mode.

2. Can I see final review after supervisor has completed it?

- a. Go to the Division Performance Review Website and click the “final” link in the One-up Review Table.